



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Final Report of Successor Administrator for Insolvent Estate and Petition for Discharge

DOD: 01/20/2006			PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner. Petitioner states: <ul style="list-style-type: none"> On 09/17/2014, by minute order, petitioner was appointed successor administrator of the decedent's estate. Decedent left a Will dated 03/01/1995, disposing of property within the subject matter jurisdiction of this Court. Said Will was admitted to Probate on 06/06/2006. Petitioner has performed all duties required in the administration of the estate of the decedent. The estate was administered under the Independent Administration of Estates Act. The estate is in a condition to be closed. The state of California Franchise Tax Board filed a creditor's claim for \$1,785.22 on 11/04/2008. The claim was never allowed or rejected. Notice to Director of Health Services is not required pursuant to Probate Code 9202 because the decedent did not receive Medi-Cal benefits. A Final Inventory and Appraisal (&A) of the estate was filed by the former administrator on 11/15/2006, consisting of personal property of \$700 and two parcels of real property value at \$510,000.00. All assets of the estate are the decedent's separate property. There is no summary of account because the Public Administrator never had control of the assets. As reported in his status report filed on 12/09/2014, the real properties were both foreclosed upon, and the whereabouts of the three items of personal property are unknown. Petitioner and her attorney waive any fees for their services. 	NEEDS/PROBLEMS/COMMENTS:
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters	6/21/06		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
Wherefore, petitioner prays that: <ol style="list-style-type: none"> The final report prepared herewith be settled, allowed and approved as filed, and all acts and proceedings of petitioner as successor administrator be confirmed and approved; The Public Administrator be discharged as successor administrator; and For such other and further orders as the Court considers just and proper. 			Reviewed by: LV Reviewed on: 03/20/2015 Updates: Recommendation: File 1 – Mayo	

2A Paul Harvey Wallace (Estate)**Case No. 08CEPR00294****Atty Donaldson, Larry A. (pro per – former Executor)****Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)****Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013**

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 7 for a related matter.</p> <p><u>CONTINUED FROM 01/21/15</u></p> <p>Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well.</p> <p>As of 03/20/15, nothing further has been filed.</p> <p>1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.</p>
Cont. from 040714, 050514, 070714, 090814, 102314, 012115		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/20/15
		Updates:
		Recommendation:
		File 2A – Wallace

2A

2B Paul Harvey Wallace (Estate)

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Case No. 08CEPR00294

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 01/21/15 Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well. As of 03/20/15, nothing further has been filed.
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/20/15
		Updates:
		Recommendation:
		File 2B – Wallace

2B

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07		LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:
		On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	CONTINUED FROM 10/23/14 Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well.
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115			
Aff.Sub.Wit.		Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	As of 03/20/15, nothing further has been filed.
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 03/20/15	
		Updates:	
		Recommendation:	
		File 2C – Wallace	

3 Victoria L. Hudgins (Estate)**Case No. 12CEPR01146****Atty Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)****1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waivers of Accounting**

DOD: 12/18/12	KEVIN HUDGINS and DANIELLE DUTRA, Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from	I & A - \$1,394,500.00	
Aff.Sub.Wit.	POH - \$1,282,000.00	
<input checked="" type="checkbox"/> Verified	Executors - waive	
<input checked="" type="checkbox"/> Inventory	Attorney - \$26,945.00 (statutory)	
<input checked="" type="checkbox"/> PTC	Distribution, pursuant to Decedent's Will, is to:	
<input checked="" type="checkbox"/> Not.Cred.	Kevin Hudgins - real property located at 2515 McCall Ave. Selma, ½ interest in the residue consisting of Page Funeral Chapel, 2014 Arrants, Selma and furniture and furnishings.	
<input checked="" type="checkbox"/> Notice of Hrg	Danielle Dutra - ½ interest in the residue consisting of Page Funeral Chapel, 2014 Arrants, Selma and furniture and furnishings.	
<input checked="" type="checkbox"/> Aff.Mail W/		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
<input checked="" type="checkbox"/> Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Reviewed by: KT
Reviewed on: 3/23/15
Updates:
Recommendation: SUBMITTED
File 3 - Hudgins

Atty Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)

1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waiver of Accounting

DOD: 4/20/2013		KEVIN HUDGINS and DANIELLE DUTRA , grandchildren and Co-Executors, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	Page 3 is the related case of the <i>Estate of Victoria Hudgins</i> , (daughter) 12CEPR01146.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	I & A — \$284,418.55	
<input checked="" type="checkbox"/>	Verified	POH — \$284,418.55 (no cash)	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Executors — waive	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney — \$8,688.37 (statutory; to be paid outside probate;)	
<input checked="" type="checkbox"/>	Aff.Mail	Attorney X/O — waives (waives \$2,400.00 fee for 12 hours @ \$200.00/hour for meetings and negotiations between parties regarding dispute and potential settlement options, preparation of agreement and assignment of interest;)	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters 090413	Distribution, pursuant to Decedent's Will and Assignment filed 10/14/2014 is to:	
	Duties/Supp		
	Objections	PAULETTE A. HALFORD - \$2,000.00 per month from payments on a promissory note, for so long as she lives and the note remains unpaid;	
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202	KEVIN HUDGINS - 50% interest in the residue consisting of Installment Note dated 2/20/2008;	
<input checked="" type="checkbox"/>	Order		
	Aff. Posting	DANIELLE DUTRA - 50% interest in the residue consisting of Installment Note dated 2/20/2008.	
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: LEG
Reviewed on: 3/23/15
Updates:
Recommendation: SUBMITTED
File 4 – Page

Atty **Armas, J. Todd (representing himself as Executor/Petitioner)****Petition for Termination of Further Proceedings and Discharging Personal Representative**

DOD: 06/28/12	TODD J. ARMAS , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states that the Petition for Probate alleged that there were assets to be administered in this estate exceeding \$100,000.00. An Inventory & Appraisal was filed 10/31/14 indicating a real property asset of the estate valued at \$75,000.00. Subsequently, Petitioner discovered that the real property asset was held in joint tenancy between the decedent and Kirby Mathershed and is therefore no subject to administration. Petitioner further alleges that he has diligently searched for assets of the decedent, but has not discovered any property of any kind belonging to the estate and subject to administration.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/o	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/25/15
		Updates:
		Recommendation:
		File 5 - Cole

Amended First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and his Attorney; and Distribution

		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 10/09/13 – 05/15/14	
		Accounting: \$115,581.70	
		Beginning POH: \$ 3,495.00	
		Ending POH: \$ 82,823.72 (\$3,495.00 is cash)	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	n/a	
	9202	n/a	
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Subsequent Account period: 05/16/14 – 12/31/14	
		Accounting: \$86,462.38	
		Beginning POH: \$82,823.72	
		Ending POH: \$76,068.70 (all cash)	
		Conservator: \$1,687.44 (for 11.64 Deputy hours @ \$96/hr plus 7.50 Staff hours @ \$76/hr, per declaration, including estimated time for management of finances, preparation of income tax returns, preparing statement of services, and making final distribution, pursuant to attached declaration)	
		Attorney: \$2,000.00 (less than allowed under Local Rule 7.16.B.1, since the Public Guardian did not have to file the paperwork to establish the conservatorship.)	
		Bond fee: \$145.44 (OK)	
		Costs: \$104.00 (for certified Letters)	
		Petitioner states the Conservatee died testate on 5-15-14. Her will was deposited by the Public Guardian on 8-14-14 (Exhibit E) and heirs are listed in the petition. However, the Conservatee received Medi-Cal benefits before she died and Notice of the Conservatee's death was sent to Medi-Cal on 5-16-14. They sent a claim for \$191,000.00.	
		After payment of the allowed commissions, fees and costs totaling \$3,936.88, Petitioner requests distribution of the remaining estate of \$72,131.82 to Medi-Cal.	
			Reviewed by: JF
			Reviewed on: 03/25/15
			Updates:
			Recommendation:
			File 6 - Lyster

7 Paul Harvey Wallace Trust

Case No. 14CEPR00601

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)
Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

DOD: 06/22/07	LAURA LEONARD , step-daughter and beneficiary of the Trust, filed a PETITION FOR ORDER ACCEPTING RESIGNATION OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC ADMINISTRATOR SUCCESSOR TRUSTEE on 07/02/14. On 08/25/14, the Petition was granted and the PUBLIC ADMINISTRATOR was appointed as Successor Trustee. Minute Order in related matter estate matter for Paul Harvey Wallace set this matter for a status hearing on 3/25/15.	NEEDS/PROBLEMS/COMMENTS: See pages 2A, 2B and 2C for related matter.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 03/20/15		
Updates:		
Recommendation:		
File 7 - Wallace		

Order to Show Cause RE: Failure to Appear and Failure to File the Inventory and Appraisal

DOD: 4-14-14		RAYNETTE GRANT , Sister, was appointed Executor with Full IAEA with bond of \$60,000.00 on 9-25-14.	NEEDS/PROBLEMS/COMMENTS:
		Bond was filed 10-2-14 and Letters issued 10-16-14.	Note: Final I&A was filed 2-5-15.
Cont 021115			Minute Order 2-11-15: Mr. Shepard and Raynette Grant are both ordered to be personally present on 3-25-15; the Court will take of the issue of increased bond on that date.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	At the hearing on 9-25-14, the Court set status hearing for the filing of the Inventory and Appraisal for 1-28-15.	
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	On 1-28-15, there were no appearances. The Court set this OSC Re Failure to Appear and Failure to file the Inventory and Appraisal and ordered both the attorney and the executor to be personally present in Court on 2-11-15.	
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Final I&A was filed 2-5-15 and indicates a total estate value of \$113,395.69 including \$2,486.19 cash, various vehicles and equipment, and a 40% undivided interest in real property.	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	Status Report by Attorney filed 3-20-15 states there was an inadvertent error in that the hearing dates of 1-28-15 and 2-1-15 were not posted on his calendar which resulted in his failure to appear. The Inventory and Appraisal of the estate has been filed and there was an assumption that the filing of the I&A removed the hearing from the court calendar. The estate is not in a condition to be closed; there are not yet sufficient funds available for payment of the decedent's debts. The attorney and the Executor will be in Court on 3-25-15 as ordered.	
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 3-23-15
			Updates:
			Recommendation:
			File 8 - Rowley

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 06/23/2015		CHRISTOPHER B. DAVIS , son, is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
		Sole heir waives bond	<p>1. Need Affidavit of Publication in the correct newspaper pursuant to Local Rule 7.9A.</p> <p>2. Proposed personal representative is a resident of Arizona. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 07/22/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 05/25/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from		Petitioner is a residence of Dewey, Arizona.	
<input type="checkbox"/>	Aff.Sub.Wit.	Full IAEA - ?	
<input checked="" type="checkbox"/>	Verified	Decedent died intestate	
<input type="checkbox"/>	Inventory	Residence: Kerman Publication: Need	
<input type="checkbox"/>	PTC	Estimated value of the Estate:	
<input type="checkbox"/>	Not.Cred.	Real property - \$482,000.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LV
Reviewed on: 03/20/2015
Updates:
Recommendation:
File 9 - Davis

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Court Investigator advised rights 3-12-15
			Voting rights affected – need minute order.
			<u>Note:</u> Notice of Hearing filed 2-13-15 indicated that a daughter, Carol Thompson, is homeless and here whereabouts are unknown. Pursuant to the Minute Order of 2-24- 15, the Public Guardian is to make efforts to locate the daughter and report back to the Court at the general hearing.
			<u>Note:</u> The Court will set status hearings as follows:
			<ul style="list-style-type: none"> • Wed, August 26, 2015 for the filing of the Inventory and Appraisal • Wed, June 22, 2015 for the filing of the first account
			If the proper items are on file prior to the status dates, the status hearings may be taken off calendar.
			Reviewed by: skc
			Reviewed on: 3-23-15
			Updates:
			Recommendation:
			File 10 - Beatty

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
	Conf. Screen	
✓	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
✓	Citation	
	FTB Notice	

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/04/2014			RICKY R. LOCKHART , surviving spouse is petitioner and requests appointment as Administrator without bond. All heirs waive bond Full IAEA – o.k. Decedent died intestate Residence: Fresno Publication: The Business Journal	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted status hearings will be set as follows: <div> • Wednesday, 07/22/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> </div> <div> • Wednesday, 05/25/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. </div> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg		Estimated value of the Estate: Personal property - \$50,000.00 Real property - \$250,000.00 Total - \$300,000.00	
✓	Aff.Mail	w/		
✓	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp		Probate Referee: Steven Diebert	
	Objections			
	Video Receipt			
	CI Report			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: LV
Reviewed on: 03/20/2015
Updates:
Recommendation: Submitted
File 11 - Lee

DOD: 1-12-89	MARY ELLEN RODRIGUEZ and DOLORES TRUJILLO, Daughters, were appointed as Co-Administrators without IAEA and with bond of \$8,000.00 on 1-16-1990.	NEEDS/PROBLEMS/COMMENTS: Note: On 2-23-15, the Court confirmed the sale of real property and set status hearing for receipt of the proceeds into a blocked account (Page B).
Cont. from 081414, 100214, 110614, 121814, 020215, 022315	Bond was filed and Letters issued on 1-17-1990.	
Aff.Sub.Wit.	Nothing further was filed.	1. Need Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Verified		
Inventory	The open estate was discovered and the Court set this status hearing.	
PTC		
Not.Cred.		
Notice of Hrg	The I & A was filed 10-1-14, showing the estate value at \$30,000.00.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 3-23-15
		Updates:
		Recommendation:
		File 12A – Rodriguez

DOD: 1-12-89		<p>DOLORES TRUJILLO, Daughter, is the sole remaining Administrators without IAEA and with bond of \$8,000.00.</p> <p>On 2-23-15, the Court confirmed the sale of real property and ordered the net proceeds of \$12,000.00 to be deposited into a blocked account.</p> <p>The Court set this status hearing for the filing of the receipt for blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for blocked account (MC-356).</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 3-23-15
			Updates:
			Recommendation:
			File 12B - Rodriguez

DOD: 12/23/11		CHRISTINE HAYS is Executor. Order and Judgment of Final Distribution was entered on 10/14/14. The order included a closing reserve of \$25,000.00. Minute Order dated 10/14/14 set this status hearing for an informal accounting of the closing reserve. Status Report filed on 03/12/15. Attorney Thomas Georgouses reports that a total of \$941.45 of the closing reserve was used to pay for bookkeeping, the CPA and bank fees. There remains a balance of \$24,124.51. Petitioner is prepared to make distribution of the closing reserve, less the \$4.00 bank fee, to: Christine Hays - \$6,030.12 Ann Hays Walorinta - \$6,030.13 Lynn Hays Kyle - \$6,030.13 Michael R. Hays - \$6,030.13 If the Court declines Petitioner's intention to distribute the remaining amount of proceeds previously held for reserve, Petitioner requests the amount to be held in reserve no exceed \$5,000.00 for no more than one year from the date of this hearing.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/23/15
			Updates:
			Recommendation:
			File 13 - Hays

Petition of Conservator for Instructions

		<p>JOYCE V. DAVIS, Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.</p> <p>Petitioner requests to sell the conservatee's real property and vehicle because funds are needed for her upkeep.</p> <p><u>Note:</u> The vehicle referred to in this petition has not been inventoried as an asset of the conservatorship estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This petition was filed by the Conservator, in pro per, on 8-18-14. Pursuant to Declaration of Melvin K. Rube filed 3-6-15, he has now been retained to represent the Conservator and requests a 60-day continuance to file a supplemental inventory and appraisal, amend the accounting, and also file a petition to resign as conservator of the estate and for appointment of Bruce Bickel as successor conservator of the estate.</p> <p>The following issues remain noted for reference only:</p> <ol style="list-style-type: none"> 1. Petitioner's First Account filed 5-15-14 was not in compliance with applicable law, and was denied on 6-24-14. This "Petition for Instructions" filed 8-18-14 requests authority to sell various assets; however, it does not contain the information necessary for the Court to consider this type of request. Further, the Court may require the First Account to be settled before authorizing further action by the Conservator. See Probate Code §§ 1020, 1060, 2540, 2620, Cal. Rules of Court 7.575, Local Rule 7.1.1.C., and other applicable law and rules. Specifically, §2540 requires that the sale be discussed with the Conservatee. 2. Based on the Inventory and Appraisals that have been filed, Petitioner's bond of \$333,000.00, based on her original estimate, is insufficient. Petitioner is reminded of her duty to increase bond pursuant to Cal. Rules of Court 7.204. Examiner calculates the appropriate bond amount to be \$502,194.24, not including the house, and also not including the vehicle that Petitioner refers to, because it has not been inventoried as an estate asset. If the house and vehicle are authorized to be sold, the bond amount will need to be adjusted accordingly. 3. The Conservatee is entitled to notice of this petition. See Probate Code §1460. (<u>Note: Petitioner mailed notice of the amended account at Page B to the Conservatee, but not this petition.</u>)
Cont. from 093014, 102214, 121014			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 3-23-15	
		Updates:	
		Recommendation:	
		File 14A - Thomas	

		JOYCE V. DAVIS , Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: This petition was filed by the Conservator, in pro per, on 10-22-14. Pursuant to Declaration of Melvin K. Rube filed 3-6-15, he has now been retained to represent the Conservator and requests a 60-day continuance to file a supplemental inventory and appraisal, amend the accounting, and also file a petition to resign as conservator of the estate and for appointment of Bruce Bickel as successor conservator of the estate. The following issues remain noted for reference only: <p style="text-align: center;"><u>SEE PAGE 2</u></p>
		Account period: 3-14-13 through 3-14-14	
Cont from 121014		Accounting: \$866,751.47	
Aff.Sub.Wit.		Beginning POH: \$ 11,334.12	
<input checked="" type="checkbox"/>	Verified	Ending POH: \$780,811.53	
Inventory		Conservator: No compensation requested	
PTC		Petitioner states the conservatee's automobile has not been sold. The car was used to transport the Conservatee and her six dogs to the veterinarian and to the pet store for food. The car has only been driven by the Conservator's husband with the Conservatee for this purpose. He took the car in for all recalls and maintenance. The insurance company was notified that the conservatee's (sic) husband would be the only authorized driver. The vehicle will be sold as soon as Conservator can obtain the pink slip. The DMV will not issue a new pink slip. The Conservatee did not file the Lien Satisfied/Legal Owner/Title Holder Release with the DMV. The vehicle was paid off several years ago, and the conservator wrote to Toyota, but has had no response. Conservator will follow up on this.	
Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/o	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
<input checked="" type="checkbox"/>	Letters	3-22-13	
Duties/Supp			
Objections			
Video Receipt			
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
	Order	x	
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice		Petitioner states the home located in Chino Hills, CA, was in need of major cleanup and repairs due to Conservatee living there for years with health issues. Conservator has secured the property and has begun cleanup and hopes to sale the house because Conservatee will be unable to return to her home in the future. Funds will be used for her placement at Somerford Place. The condition of the house prevents it being rented, and there is no income being generated from the property. No furniture or furnishings have been sold or removed from the house. Conservator has begun to contact auctioneers and antique dealers. Petitioner requests that the First Account be settled, allowed, and approved as filed, and all acts and proceedings of Petitioner be confirmed and approved.	

Reviewed by: skc
Reviewed on: 3-23-15
Updates:
Recommendation:
File 14B – Thomas

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner's Summary of Account states the beginning Property On Hand was \$11,334.12; however, it is unclear what this figure represents, as there is no schedule showing Beginning Property on Hand. The I&A and Supplemental I&A totaled \$781,540.22, of which \$397,060.22 was cash. That should be the beginning Property On Hand figure.

Further, the Summary then indicates \$20,000.64 in additional property received, \$55,189.81 in regular receipts, \$501.04 in gains, and \$779,725.86 as "other charges," which are all similarly unclear.

Further, it appears that many of the assets Petitioner originally categorized as "cash" are now categorized as "non-cash" in the Ending Property on Hand, and if that is the case, those assets require appraisal by the Probate Referee. See Probate Code §8900 et seq. This includes the characterization and appraisal of the retirement account and various insurance policies.

Need further amended account pursuant to §1060 et seq., and possibly amended I&A pursuant to §8900 et seq. Petitioner is strongly encouraged to seek assistance from an attorney going forward, as it continues to appear that non-attorney document services are not meeting her needs.

2. As noted on Page A, Petitioner's bond appears insufficient. However, it appears clarification regarding #1 is necessary above in order for to confirm an appropriate bond calculation. As noted on Page A, Examiner calculates that bond should be at least \$502,194.24, not including the house (because the Conservator does not currently have authority to sell the house) and not including the vehicle (because it was not inventoried as an asset of the conservatorship estate). Petitioner is again reminded of her duty to apply for increase in bond when appropriate pursuant to Cal. Rule of Court 7.204.
3. Petitioner's descriptions of various expenses are not sufficient to determine what the expenses were for. Specifically: "SIGNON" on 3-18-13, "AT HM REWA" on 3-26-13, and "PWA" on 4-15-13. Please note: Petitioner's other disbursements at various stores such as Costco and Target are similarly unclear; however, Petitioner provided pages and pages of copies of receipts thereafter. For future reference, copies of receipts are unnecessary and serve to add bulk and confusion to the accounting document. If properly prepared, receipts are unnecessary because the accounting should simply provide adequate descriptions of the transactions in the schedules. The only required documentation are bank statements and care facility statements pursuant to Probate Code §2620, unless otherwise requested by the Court.
4. The Disbursements Schedule indicates two donations to Greenpeace totaling \$100.00 in March and April 2013. The Court may require clarification with reference to Cal. Rule of Court 7.1059 (Standard of Conduct for Conservators of the Estate), specifically (b)(3), which prohibits making gifts with conservatorship estate funds without authorization.

Atty Jimenez, Irene (pro per – paternal aunt/Petitioner)

Atty Jimenez, Cutberto (pro per – paternal uncle/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		IRENE JIMENEZ and CUTBERTO JIMENEZ , paternal aunt and uncle, are Petitioners.		<u>CONTINUED FROM 02/11/15</u>	
		Father: ALFREDO ORTEGA – Consent & Waiver of Notice filed 11/10/14		Note: Petitioners have also petitioned for guardianship of Natalie's sister, Vanity Ortega. The general guardianship hearing for Vanity is set for 05/21/15.	
Cont. from 011415, 021115		Mother: AMBER STICKLES – Consent & Waiver of Notice filed 02/02/15			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>			
<input type="checkbox"/>	Inventory	<input type="checkbox"/>			
<input type="checkbox"/>	PTC	<input type="checkbox"/>			
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>			
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	n/a		
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	n/a		
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	n/a		
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>			
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	UCCJEA	<input type="checkbox"/>			
<input type="checkbox"/>	Citation	<input type="checkbox"/>			
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			
				Reviewed by: JF	
				Reviewed on: 03/23/15	
				Updates:	
				Recommendation:	
				File 15 – Ortega & Saldivar	

16 Aliya Mackenzie Eroles (GUARD/P)

Case No. 14CEPR00666

Atty Eroles, Kayla Michelle (Pro Per – Mother – Petitioner)

Atty Eroles, Ricardo J. (Pro Per – Maternal Grandfather – Guardian)

Atty Eroles, Teresa L. (Pro Per – Maternal Grandmother – Guardian)

Petition for Termination of Guardianship

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. The Court may require notice to all relatives pursuant to Probate Code §1460(b)(5).
Cont from 012815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail	X		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skC	
			Reviewed on: 3-23-15	
			Updates:	
			Recommendation:	
			File 16 - Eroles	

		<u>TEMPORARY EXPIRES 03/25/15</u>	NEEDS/PROBLEMS/COMMENTS:
		CANDICE ANGELIQUE MOSER , maternal grandmother, is Petitioner.	<u>CONTINUED FROM 01/28/15</u>
		Father: DAVID CONTRERAS	Minute Order from 01/28/15 states: Mr. Harris is to file a Declaration of Due Diligence regarding his efforts to locate the father.
Cont. from 100714, 120314		Mother: SAMANTHA MOSER – Personally served on 10/16/14 and Consents per minute order of 12/03/14	As of 03/25/15, nothing further has been filed and the following items remain:
<input type="checkbox"/>	Aff.Sub.Wit.	Paternal grandparents: UNKNOWN – Court dispensed with notice on 12/03/14	1. Need Notice of Hearing.
✓	Verified	Maternal grandfather: ROMAN GARCIA	2. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
<input type="checkbox"/>	Inventory	Petitioner alleges [See Petition for Details].	a. David Contreras (father) – personal service required
<input type="checkbox"/>	PTC	Court Investigator Samantha Henson filed a report on 11/25/14.	b. Roman Garcia (maternal grandfather) – service by mail sufficient
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
✓	CI Report		
<input type="checkbox"/>	9202		
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
✓	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 03/25/15
			Updates:
			Recommendation:
			File 17 - Moser

Atty Ochoa, Janete M. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<u>NO TEMPORARY IN PLACE:</u>		NEEDS/PROBLEMS/COMMENTS:	
		<u>TEMPORARY DENIED ON 10/30/14 DUE TO NON</u>			
		<u>APPEARANCE</u>			
		JANETE OCHOA, maternal grandmother, is		<u>CONTINUED FROM 02/11/14</u> 1. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Samuel Kennedy (minor) – personal service required	
		Petitioner.			
Cont. from 121714		Father: MANUEL KENNEDY – Personally served on 02/05/15			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 02/11/14

1. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing or Consent & Waiver of Notice or Declaration of Due Diligence for:
 - a. Samuel Kennedy (minor) – personal service required

Reviewed by: JF

Reviewed on: 03/25/15

Updates:

Recommendation:

File 18 - Kennedy

<p align="center"><u>Please see petition for details</u></p>			<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Jorge Gonzales (Minor) 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandfather (Unknown) • Paternal Grandmother (Unknown) • Ruth Garcia (Maternal Grandmother) 			
					Aff.Sub.Wit.	
				✓	Verified	
					Inventory	
					PTC	
					Not.Cred.	
				✓	Notice of Hrg	
				✓	Aff.Mail	w/
					Aff.Pub.	
					Sp.Ntc.	
	Pers.Serv.	x				
✓	Conf. Screen					
✓	Letters					
✓	Duties/Supp					
	Objections					
	Video Receipt					
✓	CI Report					
	9202					
✓	Order					
	Aff. Posting					
	Status Rpt					
✓	UCCJEA					
	Citation					
	FTB Notice					
			<p>Reviewed by: LV</p> <p>Reviewed on: 03/23/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Gonzales & Ortega</p>			

Atty Rodriguez, Pablo Jr. (pro per – paternal grandfather/Petitioner)

Atty Rodriguez, Rebecca (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING: 05/18/15</u>	NEEDS/PROBLEMS/COMMENTS:
		PABLO RODRIGUEZ, JR. and REBECCA RODRIGUEZ , paternal grandparents, are Petitioners.	1. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice for Felicia Garcia (mother). – Unless diligence is found. Note: The Petition indicates that the children have Indian ancestry. <u>Notice of Child Custody Proceeding for Indian Child</u> (Form ICWA-030) was served on the necessary parties on 03/12/15.
Cont. from			
	Aff.Sub.Wit.	Father: PETE RODRIGUEZ, JR. – Consent & Waiver of Notice 03/11/15	
✓	Verified		
	Inventory		
	PTC	Mother: FELICIA GARCIA – Declaration of Due Diligence filed 03/19/15	
	Not.Cred.		
	Notice of Hrg	x Maternal grandfather: RICARDO GARCIA	
	Aff.Mail	Maternal grandmother: MARY HELEN SANCHEZ	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x Siblings: MARCELA GARCIA, PETE RODRIGUEZ, III, AMERISSA RODRIGUEZ	
✓	Conf. Screen		
✓	Letters	Petitioners state [See Petition for details]	
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF
			Reviewed on: 03/25/15
			Updates:
			Recommendation:
			File 23 - Rodriguez

DOD: 8-7-10			JOHN P. MCCANN and COLLEEN E. DEMPSEY, Co-Executors with Full IAEA without bond, are Petitioners.			NEEDS/PROBLEMS/ COMMENTS:		
						<u>This matter is set for 3:30 pm in Dept. 502.</u>		
			I&A Partial No. 1 (Corrected) filed 2-18-15 indicates \$64,134.87 cash plus various securities and an annuity contract, for a total of \$446,813.85.			1. Petitioners do not address notice to the various agencies pursuant to Probate Code §9202, including the Director of Health Care Services, the Director of the CA Victim Compensation and Government Claims Board, and the CA Franchise Tax Board.		
			I&A Partial No. 2 (Final) filed 2-28-14 indicates an additional \$31,737.23 in cash.			Need further information prior to authorizing preliminary distribution pursuant to Probate Code §11621.		
			Total Inventory and Appraisal Value: \$478,551.08.					
			Petitioners state they are holding a balance of \$525,773.97, of which \$368,334.12 is in cash. Cash of \$200,000.00 can be distributed to John P. McCann and Colleen E. Dempsey as Co-Trustees of the Surviving Trustor's Trust in accordance with the decedent's will without loss to creditors or injury to the estate of any interested person. The Surviving Trustor's Trust is the sole beneficiary of the estate and the aggregate of all property distributed does not exceed 50% of the net value of the estate. The value of the amount remaining in the hands of the personal representatives after the preliminary distribution will be \$325,773.97, which is more than sufficient to pay all commissions, fees and costs of administration.					
			The estate is not in a position to close because the personal representatives are waiting for a final determination of the claim against Daniel J. McCann for monies alleged to have been taken by Mr. McCann from the decedent filed in the trust matter 11CEPR00871. The monies may belong to the decedent's estate.					
			No prior distributions have been made in this matter. Petitioners request the Court waive bond under §11622.					
			Petitioners pray for an order of this Court as follows:					
			1. That cash in the amount of \$200,000.00 be ordered distributed to John P. McCann and Colleen E. Dempsey, Co-Trustees of the Surviving Trustor's Trust, the sole beneficiary of the estate;					
			2. That no bond will be required of the distributed in this matter;					
			3. The costs of this proceeding be ordered paid by the estate; and					
			4. Such further orders as the Court may deem proper.					